

Top UIT Investment Strategies

As of 7/31/2023

By Investment Strategy Goal

Investment Category - Domestic Equity

3 Year Composite Performance (7/31/2020 - 7/31/2023) (Continued)

Strategy Name	Sponsor	ADVISORY		BROKERAGE	
		Cumulative Return	CAGR	Cumulative Return	CAGR
Thematic					
Building America Strategy Portfolio	Advisors Asset Management	141.63%	34.19%	134.54%	32.86%
Richard Bernstein Advisors Tactical Series, American Industrial Renaissance®	First Trust Portfolios	114.18%	28.90%	106.59%	27.36%
U.S. Infrastructure Portfolio	First Trust Portfolios	110.54%	28.17%	101.39%	26.28%
Homebuilders Recovery Select Portfolio	First Trust Portfolios	78.87%	21.39%	72.13%	19.84%
Agri - Business Opportunities Portfolio	Advisors Asset Management	69.30%	19.19%	62.96%	17.68%
American Renaissance Portfolio - A CJL LLC Portfolio	Advisors Asset Management	64.06%	17.94%	59.21%	16.77%
Aerospace & Defense Portfolio	First Trust Portfolios	63.53%	17.81%	58.15%	16.51%
AI, Robotics & Technology Opportunity Portfolio	First Trust Portfolios	62.98%	17.68%	57.84%	16.43%
Recovery Strategy Portfolio	Advisors Asset Management	62.82%	17.64%	52.97%	15.22%
American Agenda Portfolio	First Trust Portfolios	61.03%	17.21%	55.82%	15.93%

The UIT Scorecard reflects performance for advisory and brokerage share classes, and includes all applicable fees and charges for advisory and brokerage share classes.

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